

What is claimed is:

1. A method for generating a visual compliance display comprising:
  - providing a plurality of different compliance obligations;
  - providing a first user interface having a first input area, a second input area and a status area;
  - receiving first input data relating to an information and associated with a compliance obligation, said first input data provided to said first input area;
  - automatically determining a first scalable level of compliance in dependence upon compliance obligations satisfied by said first input data;
  - automatically displaying within said status area of said first user interface an indication based on said first scalable level of compliance;
  - receiving second input data relating to another information and associated with a compliance obligation, said second input data provided to said second input area;
  - automatically determining a second scalable level of compliance in dependence upon compliance obligations satisfied by said first input data and said second input data; and
  - automatically displaying within said status area of said first user interface an indication based on said second scalable level of compliance.
2. The method according to claim 1 wherein said indication is a visual indication displayed within said status area is displayed as a scale that is representative of a level of compliance.
3. The method according to claim 1 wherein said indication is a visual indication and wherein upon receiving of input data said visual indication displayed within said status area is an update to that which has been previously displayed.
4. The method according to claim 1 wherein said indication is based on a relative scale of level of compliance based at least in part on a level of complexity associated with obtaining said first input data and said second input data.

5. The method according to claim 1 wherein said first input data and said second input data are associated with data derived from healthcare data.
- 5 6. The method according to claim 1 wherein said first input data and said second input data are derived from client event information.
7. The method according to claim 1 wherein upon reviewing said status area and said information displayed therein, a provider of said input data has sufficient  
10 information to determine when said input data provided is sufficient for supporting a claim for payment dependent upon meeting predetermined compliance obligations.
8. The method according to claim 7 comprising the step of when said input data is  
15 insufficient to support said claim for payment, entering additional information in order to meet said predetermined compliance obligations.
9. The method according to claim 1 comprising the step of establishing an event with a client prior to step 1.c.
- 20 10. The method according to claim 9 wherein said plurality of different compliance obligations include one or more requirements established by a third party payor in privity with said client.
- 25 11. The method according to claim 10 comprising the step of generating a financial obligation statement upon meeting predetermined compliance obligations.
12. The method according to claim 11 comprising the step of transmitting said financial obligation statement to said third party payor.
- 30 13. The method according to claim 12 comprising the step of receiving a reply from said third party payor, wherein said reply comprises payment information for payment by said third party payor.

14. The method according to claim 13 comprising the step of automatically reconciling differences between said financial obligation statement and said payment information.
- 5 15. The method according to claim 13 wherein said client is a healthcare patient, said provider is a healthcare provider, and said third party payor is one of a public insurance provider and a private insurance provider and a combination of distinct public and private insurance providers.
- 10 16. The method according to claim 12 comprising the step of accumulating a plurality of financial obligation statements destined for said third party payor; and wherein said step of transmitting said financial obligation statement comprises said step of: transmitting said plurality of financial obligation statements to said third party payor in a batch.
- 15 17. The method according to claim 16 wherein said steps of accumulating and transmitting are accomplished absent a clearinghouse intermediary.
- 20 18. A method for generating a financial obligation statement for a non-gratuitous benefit provided to a client comprising the steps of:
  - a. establishing an event with a client;
  - b. determining a level of compliance with one or more requirements established by a third party payor in privity with said client;
  - 25 c. displaying said level of compliance;
  - d. generating a financial obligation statement derived at least in part from said level of compliance; and,
  - e. transmitting said financial obligation statement to said third party payor.

19. The method according to claim 18 wherein said estimating an event includes:
- recording at least demographic information associated with a group of prospective clients attending a presentation associated with said provider;
  - establishing at least one of said group of said prospective clients as said client;
  - scheduling an appointment with said client;
  - recording information associated with said third party payor;
  - providing a benefit to said client; and,
  - recording said benefit provided to said client.
20. The method according to claim 18 wherein said estimating an event includes:
- receiving a referral for a prospective client;
  - establishing said prospective client as said client;
  - scheduling an appointment with said client;
  - recording information associated with said third party payor;
  - providing a benefit to said client; and,
  - recording said benefit provided to said client.
21. The method according to claim 18 wherein said estimating an event includes:
- scheduling an appointment with said client, wherein said client is an established client;
  - providing a benefit to said client; and,
  - recording said benefit provided to said client.
22. The method according to claim 18 wherein said transmitting includes recording an approval provided by an authorized individual associated with said provider.

19. The method according to claim 18 wherein said estimating an event includes:
  - recording at least demographic information associated with a group of prospective clients attending a presentation associated with said provider;
  - establishing at least one of said group of said prospective clients as said client;
  - scheduling an appointment with said client;
  - recording information associated with said third party payor;
  - providing a benefit to said client; and,
  - recording said benefit provided to said client.
20. The method according to claim 18 wherein said estimating an event includes:
  - receiving a referral for a prospective client;
  - establishing said prospective client as said client;
  - scheduling an appointment with said client;
  - recording information associated with said third party payor;
  - providing a benefit to said client; and,
  - recording said benefit provided to said client.
21. The method according to claim 18 wherein said estimating an event includes:
  - scheduling an appointment with said client, wherein said client is an established client;
  - providing a benefit to said client; and,
  - recording said benefit provided to said client.
22. The method according to claim 18 wherein said transmitting includes recording an approval provided by an authorized individual associated with said provider.

23. The method according to claim 18 further including;
- receiving a reply from said third party payor, wherein said reply comprises payment information granted by said third party payor; and,
  - 5 • automatically reconciling differences between said financial obligation statement and said payment information.
24. The method according to claim 18 wherein said client is a healthcare patient, said provider is a healthcare provider, and said third party payor is a public insurance  
10 provider, a private insurance provider or combination of distinct public and private insurance providers.
25. The method according to claim 18 wherein said transmitting includes:
- accumulating a plurality of financial obligation statements destined for  
15 said third party payor; and,
  - transmitting said plurality of financial obligation statements to said third party payor in a batch.
26. The method according to claim 25 wherein said accumulation is accomplished  
20 absent a clearinghouse intermediary.

27. A system for generating a financial obligation statement for a non-gratuitous benefit provided to a client for provision to a third party payor comprising:  
a computer system comprising;
- 5 a processor;  
a user interface coupled to said processor;  
a display interface coupled to said processor;  
a telecommunications apparatus coupled to said processor;  
a memory coupled to said processor, said memory having operatively  
10 stored therein a data structure comprising information associated with a client; and,  
at least one application comprising instructions executable by said processor for carrying out the steps of:
- determining a level of compliance from said information,
  - 15 ▪ displaying said level of compliance on said display interface,
  - generate a financial obligation statement from said information, and
  - transmitting said financial obligation statement to said third party payor via said telecommunications apparatus.
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28. The system according to claim 27 wherein said data structure comprises a database having stored therein a plurality of client data including information associated with said client.

29. The system according to claim 28 wherein said database comprises;
- a client data storage area having at least one client record associated with said client stored therein;
- 5                    an events data storage area having at least one event record associated with said client stored therein;
- a third party payor data storage area having at least one third party payor record associated with said client stored therein; and,
- a benefits data storage area having at least one benefit record associated with said client stored therein.
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30. The system according to claim 28 wherein said database is disposed on a server in data exchange communication with said computer system.
- 15 31. The system according to claim 27 wherein said level of compliance is displayed on said display interface in a visual manner that is indicative of the level of compliance.
32. The system according to claim 31 wherein said relative scale is based at least in part on a level of complexity associated with obtaining said information.
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33. The system according to claim 27 wherein said display interface includes an end user customizable graphical user interface.



34. An integrated healthcare management information system comprising:  
a financial claim generation system comprising:  
a database management system,  
a data entry system,  
5 a financial obligation statement verification system, and,  
a financial obligation statement submission system; and,  
a claim reconciliation system comprising:  
a payment information receiving system,  
a payment information parsing system,  
10 a payment information reconciliation system for reconciling received  
payment information with claims generated and submitted by the financial claim  
generation system, and  
a reconciliation error management system.
- 15 35. The integrated healthcare management information system according to claim 34  
wherein the reconciliation error management system comprises a system for  
automatic correction of some reconciliation errors.
- 20 36. The integrated healthcare management information system according to claim 34  
implemented within at least a client computer system operatively coupled to a  
network and in data communications with at least a remote server over said  
network.
- 25 37. The integrated healthcare management information system according to claim 36  
comprising an end user customizable graphical user interface.

38. The integrated healthcare management information system according to claim 37 comprising at least a remote server for receiving a request for retrieval of at least a portion of said information stored within said at least a remote server, for  
5 transferring said requested at least a portion of said information from said at least a remote server to said at least a client computer, and wherein said at least a client computer system is for displaying at least a portion of said transferred information using said end user customizable graphical user interface.
- 10 39. The integrated healthcare management information system according to claim 38 wherein the at least a client computer system is for controlling said at least a remote server to generate at least one financial obligation statement and for resulting in said at least one remote server to transmit said at least one financial obligation statement to a third party payor and wherein said at least a client  
15 computer system is for automatically reconciling differences between said at least one financial obligation statement and said payment information.

40. An integrated healthcare management information system comprising:  
at least one networked server coupled to a substantially ODBC compliant  
database system having a plurality of relationally linked data structures, each data  
structure comprising;  
5 a patient healthcare data storage area;  
an events data storage area;  
a third party payor data storage area;  
a provider data storage area; and,  
10 a payment data storage area, wherein said data storage areas each include  
at least one attribute in common with said patient healthcare table; and  
at least a client terminal comprising a processor;  
a user interface coupled to said processor;  
a display interface coupled to said processor; and,  
15 a telecommunication apparatus for resulting in communication with said at least  
one networked server for extracting data from at least a portion of the plurality of  
relationally linked data structures and for storing data within at least a portion of  
said plurality of relationally linked data structures; and wherein said client  
terminal for executing at least one front end application compatible with said data  
20 structure and including an end user customizable graphical user interface.
41. The integrated healthcare management information system according to claim 40  
wherein said patient healthcare data storage area includes patient history  
information, patient medical status information and medical decision information.
- 25 42. The integrated healthcare management information system according to claim 40  
wherein said events data storage area includes patient appointment information,  
patient office visit information and provider schedule information.

43. The integrated healthcare management information system according to claim 40 wherein said third party payor data storage area includes private insurer information, public insurer information, private insurer payor rules, and public insurer payer rules.
- 5 44. The integrated healthcare management information system according to claim 40 wherein said provider data storage area includes provider office location information, provider administrative information, provider database security information.
- 10 45. The integrated healthcare management information system according to claim 40 wherein said payment data storage area includes patient payment information, third party payment information and payment reconciliation information.
- 15 46. The integrated healthcare management information system according to claim 40 further including a financial management data storage area.
47. The integrated healthcare management information system according to claim 46 wherein said financial management data storage area includes financial  
20 accounting information, profitability information, income information and expense information.
48. The integrated healthcare management information system according to claim 40 further including a financial management interface for operatively coupling to a  
25 financial management database.

49. A processing system for carrying out the steps of:
- providing a plurality of different compliance obligations;
  - providing a first user interface having a first input area, a second input  
5 area, and a status area;
  - receiving first input data relating to an information and associated with a compliance obligation, said first input data provided to said first input area;
  - automatically determining a first scalable level of compliance in  
10 dependence upon compliance obligations satisfied by said first input data;
  - automatically displaying within said status area of said first user interface an indication based on said first scalable level of compliance;
  - receiving second input data relating to another information and associated with a compliance obligation, said second input data provided to said  
15 second input area;
  - automatically determining a second scalable level of compliance in dependence upon compliance obligations satisfied by said first input data and said second input data; and
  - automatically displaying within said status area of said first user interface  
20 an indication based on said second scalable level of compliance.

50. A computer readable medium having data stored thereon comprising:
- first instruction data for when executed providing a plurality of different compliance obligations;
  - second instruction data for when executed providing a first user interface having a first input area, a second input area, and a status area;
  - third instruction data for when executed receiving first input data relating to an information and associated with a compliance obligation, said first input data provided to said first input area;
  - fourth instruction data for when executed automatically determining a first scalable level of compliance in dependence upon compliance obligations satisfied by said first input data;
  - fifth instruction data for when executed automatically displaying within said status area of said first user interface an indication based on said first scalable level of compliance;
  - sixth instruction data for when executed receiving second input data relating to another information and associated with a compliance obligation, said second input data provided to said second input area;
  - seventh instruction data for when executed automatically determining a second scalable level of compliance in dependence upon compliance obligations satisfied by said first input data and said second input data; and
  - eighth instruction data for when executed automatically displaying within said status area of said first user interface an indication based on said second scalable level of compliance.
51. A computer program product embodied in a tangible form readable by at least one processor having executable instructions stored thereon for causing said at least one processor to at least determine a level of compliance from inputted information, display said level of compliance on a display interface, generate a financial obligation statement from said inputted information, and transmit said financial obligation statement to a third party payor via a coupled telecommunications apparatus.

52. The computer program product according to claim 51 wherein said tangible form includes magnetic media, optical media or logical media.
53. The computer program product according to claim 51 wherein said executable instructions are stored in a code format comprising byte code, compiled,  
5 interpreted, compliable and interpretable.